

May 10, 1999

**AMENDMENT # 5
TO
RFA# TIRNO-99-H-00002, PROJECT 4
COOPERATIVE MARKETING TO PROMOTE
ELECTRONIC FILING**

The purpose of this amendment is to announce an additional idea for a cooperative marketing agreement for the 2000 filing season.

1. The following text is added to the RFA's Section 1.2, Scope of Request for Agreement (RFA):

Offerors are invited to propose a cooperative marketing campaign to communicate key messages to filers of individual tax returns concerning the ETA programs stated in the RFA and to publicize and encourage the use of on-line IRS *e-file* products in return for IRS distribution of the individual federal income tax preparation/transmission software. Rather than downloading software from a web site, some taxpayers are more comfortable installing a CD Rom or 3 1/2" diskette onto their home computer and working at their own paces. Offerors shall define their target audience (or whom they would like to have a CD Rom mailed to) based on their choice of variables selected from the ETA Marketing Database. In return for a mailout by the IRS to the selected market segment, Offerors should provide tax preparation software products or services such as electronic filing and printing of the return at no cost or at lower prices to the taxpayer. Consider including with the software an IRS *e-file* key message to anyone currently submitting a paper Form 1040 with Schedule C or to all paper filers with a filing status equal to married filing joint returns with an adjusted gross income less than \$50K or some other threshold.

The software proposed for mailing by the IRS must be for the preparation of individual federal income tax returns, that is, the program must provide the taxpayer with the capabilities to actually prepare the return and compute the taxes or refund due. The software developer must be approved by the IRS for the 2000 On-Line Filing (OLF) Program through the acceptance/suitability process and PATS testing by November 30, 1999. The offeror must reach agreement with the IRS on: (1) the total number of CD-ROMs to be mailed by the IRS, (2) no or reduced-cost electronic filing services, and (3) tracking and reporting the number of unique taxpayers that actually prepare and electronically file federal individual returns using the software product as a result of this agreement.

2. The following text is added as Section 1.5 Marketing Database Variables:

The following variables or some combinations thereof are available for the Offeror to select the specific market segment they wish to market their products and/or services

to:

- , Postal Zip Code
- , Primary Taxpayer's Age
- , Extension to File Return Granted
- , Type of Return Filed
 - 1= F1040
 - 2= F1040A
 - 3= F1040EZ
 - 4= F1040PC or F1040T
 - 5= F1040NR
 - 6= TeleFile
- , Julian Date of the Return filed in 1999
- , Filing Status Code
 - 1= Single
 - 2= Married Filing Joint
 - 3= Married Filing Separately
 - 4= Head of Household
 - 5= Widow(er) with Dependent Children
 - 6= Married Filing Separate and Spouse Not Required to File
 - 7= Head of Household with an Unmarried Child's Name Listed on Line 4
- , Number of Dependents
- , Total Wages
- , Adjusted Gross Income
- , Earned Income Credit Reported
- , Refund or Balance Due Return
- , TeleFile Package was Mailed to Taxpayer
- , Taxpayer Used TeleFile in the Previous Year
- , Schedule A Attached to Return
- , Schedules C Attached to Return
- , Schedule D Attached to Return

, Schedule E Attached to Return

, Schedules F Attached to Return

3. The following text is added to Section 2.1 Project Plan:

Project Plans shall include graphic illustrations of proposed messages for cooperatively marketing the offeror-s products and services and IRS *e-file*. Offeror-s shall clearly indicate in their proposal the number of CD-ROMs they can provide for mailout. A random selection within the market segment will be made based on the proposed volume of CD-ROMs. Project Plans will also define what variables the Offeror wishes to select for their market segment. Any or all of the above variables may be suggested.

A description of milestones and time frames is also requested. The Offeror-s time frames should not significantly conflict with IRS time frames which are estimated as follows:

Evaluation of CD-ROM distribution proposals	6/18/99
Agreement(s) Award Date.....	6/30/99
Extracts Completed Based on Market Segment Variables.....	8/15/99
Offeror Obtains Approval for Year 2000 On-Line Filing (OLF).....	11/30/99
IRS Receives CD-s from Offeror.....	12/14/99
Market Segment Extract Mailing Labels Printed.....	12/14/99
CD-s Mailed Out to Market Segments.....	12/28/99

The Project Plan will clearly describe how the Offeror will track and report the number of unique taxpayers that use the IRS *e-file* on-line product as a result of the marketing campaign.

4. The seventh sentence in the RFA-s Section 3.0, Delivery of Proposa/Project Plan, is deleted and the following sentences are substituted:

AOrganizations who are interested in submitting proposals for the 2000 filing season (tax year 1999) must do so by June 8, 1999. We encourage everyone who has been preparing a proposal prior to May 11, 1999, to proceed with its completion and delivery on or before May 28, 1999. All proposals in response to this RFA#TIRNO-99-H-00002/Project 4 must be completely transmitted through electronic mail by 5:00 p.m. Eastern Time, June 8, 1999.@

